



EmergeOrtho

How Certificate of Need Laws Impact Patient Care

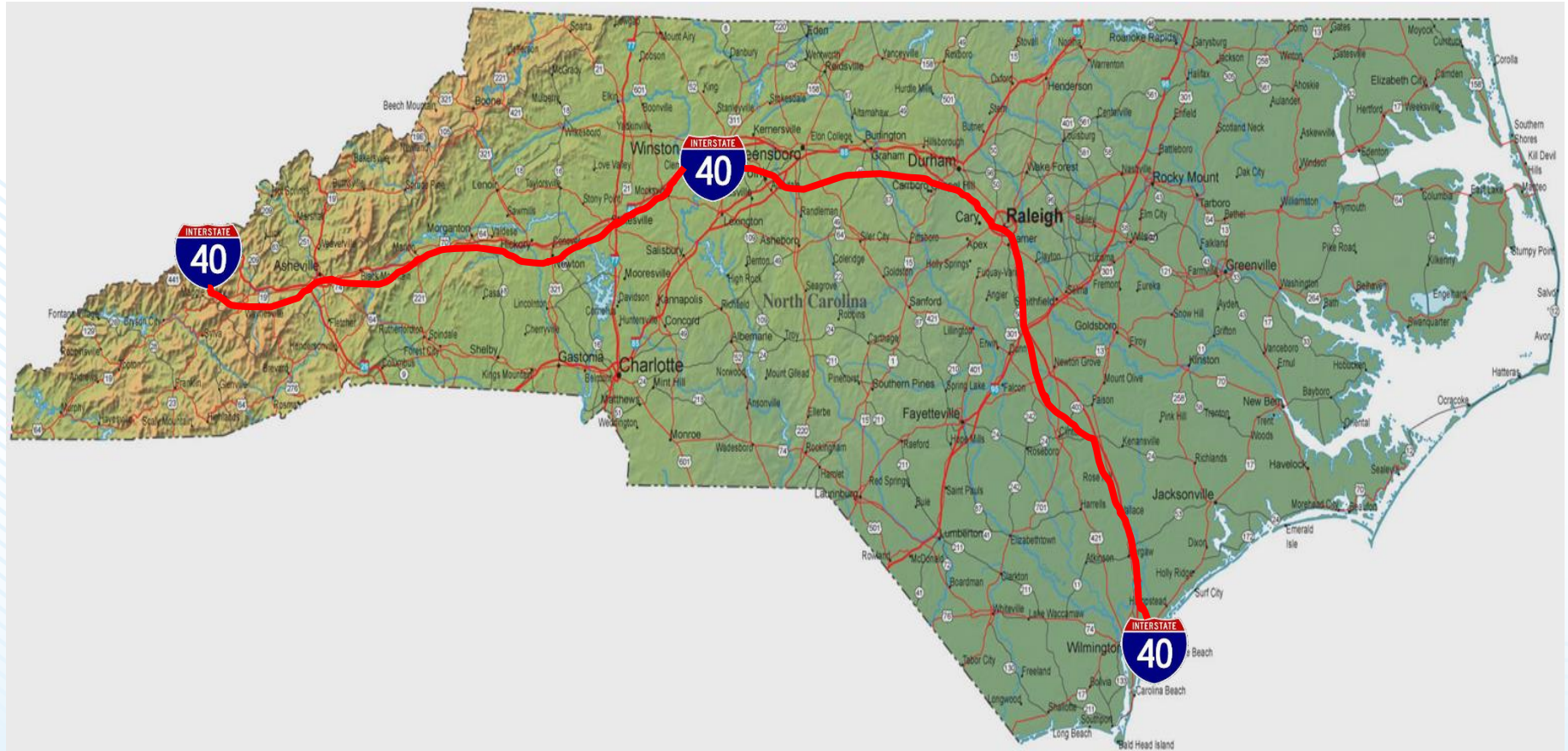
**Joint Legislative Committee on Access to Healthcare and
Medicaid Expansion**

April 11, 2022

[EmergeOrtho.com](https://www.EmergeOrtho.com)

EmergeOrtho, PA

Who Are We & What Is Our Footprint?



EmergeOrtho, PA

Who Are We & What Is Our Footprint?



- ◆ largest physician-owned orthopedic practice in the state and fifth-largest in the country with over 1,850 employees statewide
- ◆ 45 outpatient offices in 20+ counties from the mountains to the coast
- ◆ 130 Physicians
- ◆ spine, sports medicine, joint replacement & reconstruction, hand & upper extremity, foot & ankle, trauma, pediatrics, and pain management.



Today's Independent Group Challenges

- ◆ Downward pressure on reimbursements
- ◆ Unrelenting increased cost to provide services
- ◆ **Governmental regulation** and mandates
- ◆ Movement away from Fee for Service Payments
- ◆ Balancing control of healthcare dollars with hospital systems
- ◆ Value for cost initiatives - transparency/outcomes
- ◆ Restricted commercial health insurance networks

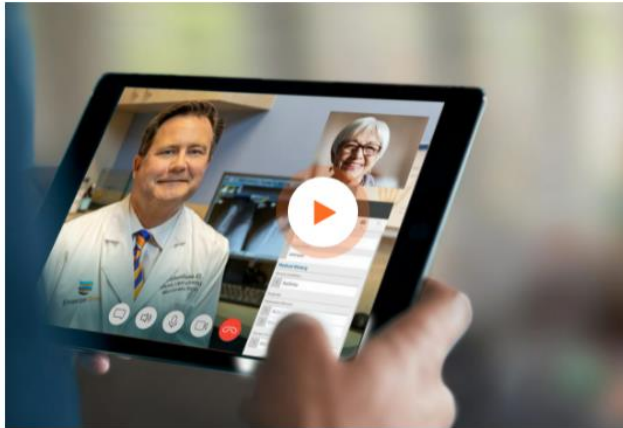


What is important? How do we compete?

- ◆ Size/Scalability/Leverage
- ◆ Institutional Knowledge and Robust Analytics
- ◆ Platforms to Understand “Cost of Care”
- ◆ Sustainable Service Bundles and Value-Based Care
- ◆ Develop Evidence-Based Treatment Algorithms for “Episodes of Care” (surgical and non-surgical)
- ◆ Telemedicine, education, access to care, price transparency and accountability by all including Payors, Patients and Providers....and Policymakers

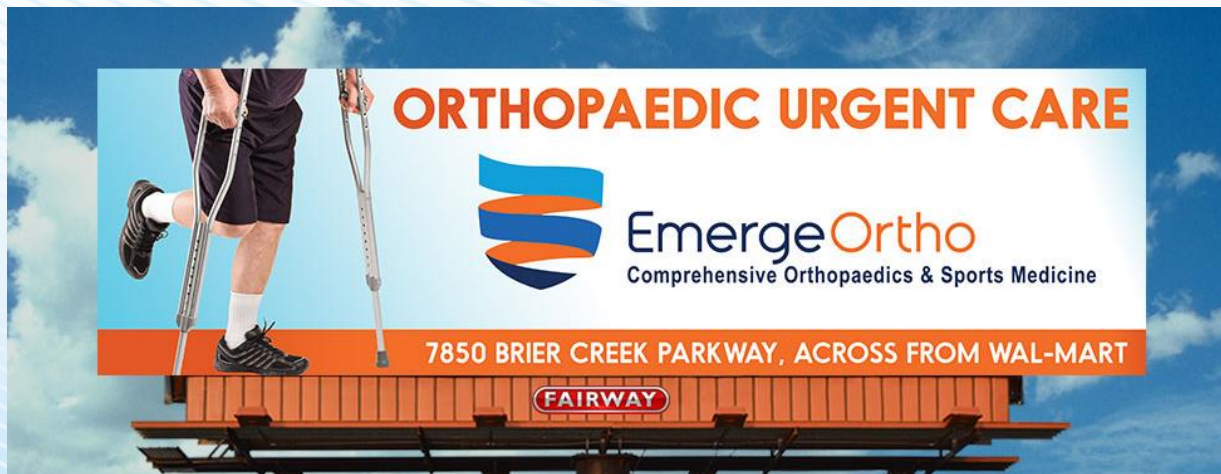


Patient Access : 27 Walk-In Clinics Statewide, Telehealth and Self Scheduling



Walk, Hobble or Crawl in Today!

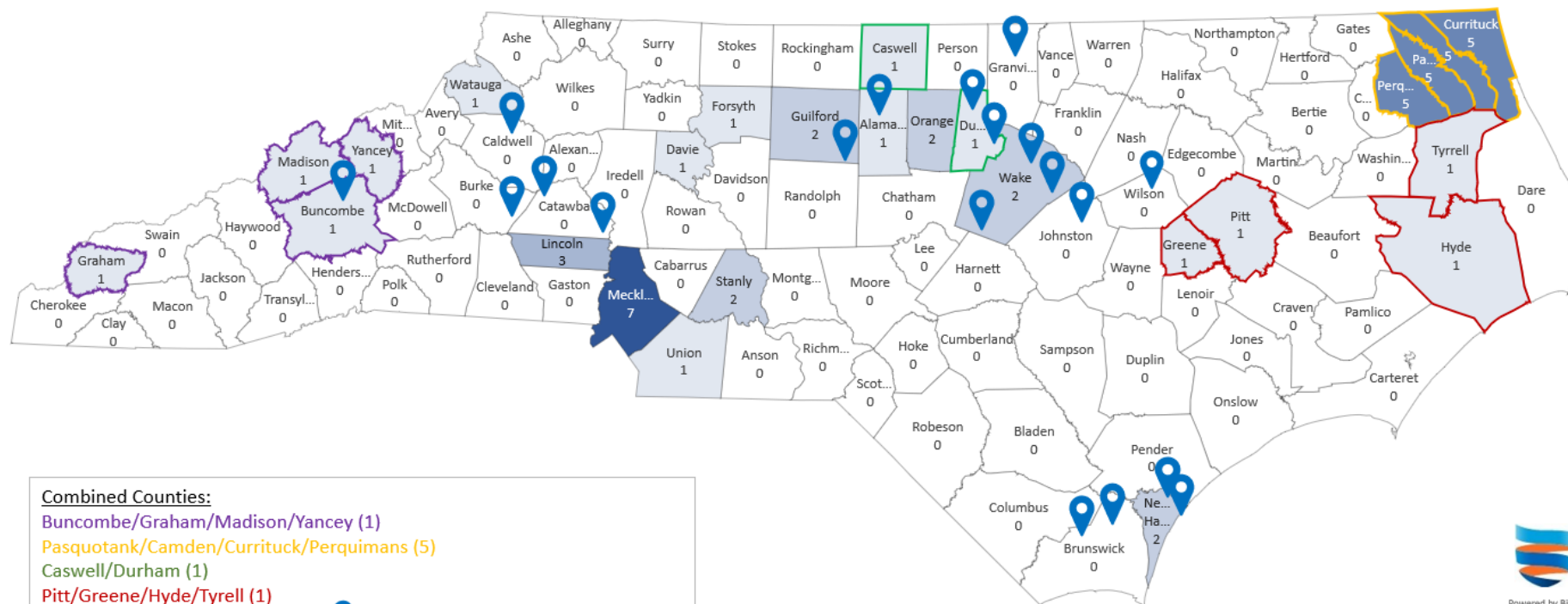
 **ACCESSORTHO**
Orthopedic Urgent Care. No Appointment Necessary.



Patient Access to Advanced Imaging



MRI Needs Per County SMFP 2012 to 2022



Combined Counties:

Buncombe/Graham/Madison/Yancey (1)

Pasquotank/Camden/Currituck/Perquimans (5)

Caswell/Durham (1)

Pitt/Greene/Hyde/Tyrell (1)

Emerge Ortho MRI Locations (19) 

Annual MRIs in Counties Without “Need” in 10 years

County	Blue Ridge	Foothills	Triad	Coastal	Triangle	Total
ONslow				404	2	406
HALIFAX					190	190
BRUNSWICK	2			154		156
JOHNSTON			1		121	122
WILSON				1	111	112
HENDERSON	94					94
CALDWELL	1	88			1	90
MCDOWELL	39	47				86
PENDER				85	1	86
BURKE	12	71				83
NORTHAMPTON					63	63
DUPLIN				54		54
HAYWOOD	53					53
CATAWBA	1	44		1		46
TRANSYLVANIA	42					42
JACKSON	32	1				33
NASH				1	30	31
COLUMBUS				28		28
HERTFORD					27	27
HARNETT					23	23
MACON	20					20
WAYNE				1	19	20
SAMPSON				6	13	19
GRANVILLE					17	17
PERSON					15	15
RUTHERFORD	13	1				14
FRANKLIN				1	12	13
BERTIE					12	12
CUMBERLAND				1	10	11
WILKES		10			1	11
VANCE					11	11
EDGECOMBE				1	9	10
JONES				9	1	10
BLADEN				10		10
Total	344	275	9	773	719	2,120



Patient Cost for Advanced Imaging



MRI- Coastal

<http://www.bcbsnc.com/content/providersearch/treatments/index.htm#/>

As of 10.2.19

Estimated Treatment Cost Results

MRI Lower Limb, 30 miles from 28403 - [Modify Your Search](#)

Emergeortho, PA

3787 Shipyard Blvd
Wilmington, NC 28403

Blue Value

\$817

Blue Options, Blue Advantage

\$817

Wilmington Health PLLC

1227 Medical Center Dr
Wilmington, NC 28401

Blue Value

\$1,181

Blue Options, Blue Advantage

\$1,181

New Hanover Regional Medical Center

2131 S 17th St
Wilmington, NC 28401

Blue Value

\$2,350

Blue Options, Blue Advantage

\$2,585

Novant Health Brunswick Medical Center

240 Hospital Dr NE
Bolivia, NC 28422

Blue Value

\$2,401

Blue Options, Blue Advantage

\$2,802



MRI- Triangle

http://www.bcbsnc.com/content/providersearch/treatments/index.htm#

As of 10.2.19

Estimated Treatment Cost Results

MRI Lower Limb, 30 miles from durham nc - [Modify Your Search](#)

Emergeortho, PA

120 William Penn Plz
Durham, NC 27704

Blue Value

\$817

Blue Options, Blue Advantage

\$817

Rex Hospital

4420 Lake Boone Trl
Raleigh, NC 27607

Blue Value

\$1,299

Blue Options, Blue Advantage

\$1,618

UNC Hospitals

101 Manning Dr
Chapel Hill, NC 27514

Blue Value

\$1,434

Blue Options, Blue Advantage

\$1,740

Duke University Hospital

2301 Erwin Rd
Durham, NC 27710

Blue Options, Blue Advantage

\$1,608



MRI- Triad

[http://www.bcbsnc.com/content/providersearch/treatments/index.htm#/
As of 10.2.19](http://www.bcbsnc.com/content/providersearch/treatments/index.htm#/)

Estimated Treatment Cost Results

MRI Lower Limb, 30 miles from greensboro nc - [Modify Your Search](#)

Emergeortho, PA
3200 Northline Ave
Ste 200
Greensboro, NC 27408

Blue Value
\$817

Blue Options, Blue Advantage
\$817

Orthocarolina, PA
445 Pineview Dr
Ste 220
Kernersville, NC 27284

Blue Value
\$822

Blue Options, Blue Advantage
\$822

Novant Health Forsyth Medical Center
3333 Silas Creek Pkwy
Winston Salem, NC 27103

Blue Value
\$1,544

Blue Options, Blue Advantage
\$1,783

North Carolina Baptist Hospital
Medical Center Blvd
Winston Salem, NC 27157

Blue Value
\$1,615

Blue Options, Blue Advantage
\$1,765

Moses Cone not
reported on
website



MRI- Foothills

Estimated Treatment Cost Results

http://www.bcbsnc.com/content/providersearch/treatments/index.htm#

MRI Lower Limb, 30 miles from Hickory NC - [Modify Your Search](#)

As of 10.2.19

<p>Emergeortho, PA</p> <p>2165 Medical Park Dr Hickory, NC 28602</p>	<p>Blue Value \$817</p> <p>Blue Options, Blue Advantage \$817</p>
<p>Orthocarolina, PA</p> <p>214 18th St SE Hickory, NC 28602</p>	<p>Blue Value \$822</p> <p>Blue Options, Blue Advantage \$822</p>
<p>Frye Regional Medical Center</p> <p>420 N Center St Hickory, NC 28601</p>	<p>Blue Value \$1,163</p> <p>Blue Options, Blue Advantage \$1,268</p>
<p>CHS Blue Ridge</p> <p>2201 S Sterling St Morganton, NC 28655</p>	<p>Blue Value \$2,016</p> <p>Blue Options, Blue Advantage \$2,532</p>
<p>Catawba Valley Medical Center</p> <p>810 Fairgrove Church Rd Hickory, NC 28602</p>	<p>Blue Options, Blue Advantage \$2,158</p>



MRI- Blue Ridge

http://www.bcbsnc.com/content/providersearch/treatments/index.htm#

As of 10.2.19

Estimated Treatment Cost Results

MRI Lower Limb, 30 miles from Asheville NC - [Modify Your Search](#)

Emergeortho, PA

129 McDowell St
Asheville, NC 28801

Blue Value

\$817

Blue Options, Blue Advantage

\$817

Orthocarolina, PA

7 Vanderbilt Park Dr
Asheville, NC 28803

Blue Value

\$822

Blue Options, Blue Advantage

\$822

Haywood Regional Medical Center

262 Leroy George Dr
Clyde, NC 28721

Blue Value

\$1,078

Blue Options, Blue Advantage

\$1,078

Marg R. Pardee Memorial Hospital

800 N Justice St
Hendersonville, NC 28791

Blue Value

\$1,889

Blue Options, Blue Advantage

\$1,889

Park Ridge Health

100 Hospital Dr
Hendersonville, NC 28792

Blue Value

\$2,427

Blue Options, Blue Advantage

\$2,427

Mission not
reported on
website



MRI Take-Aways

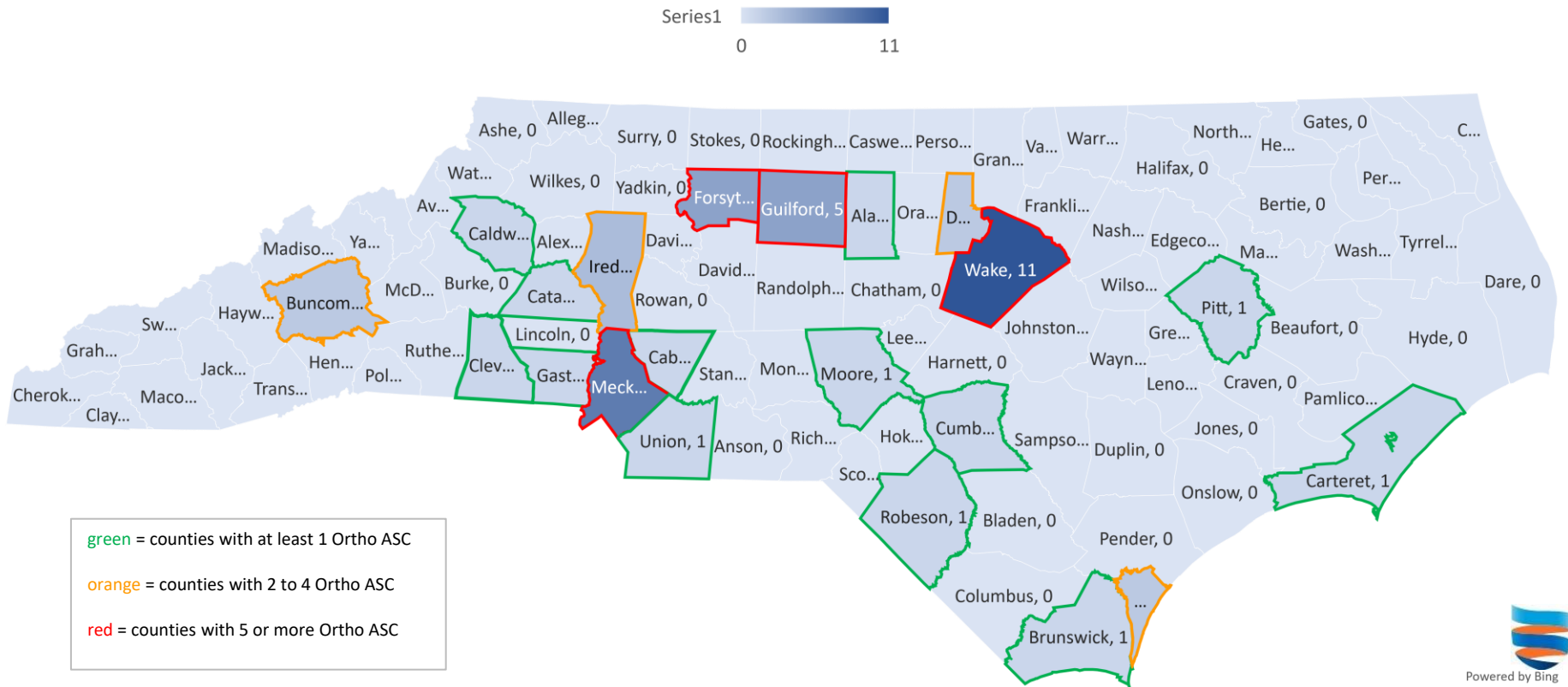
- ◆ Limited Access to Rural Counties and associated transportation barriers (young & elderly)
- ◆ Diversion to Higher Cost Facilities
- ◆ Challenges with Patient Care Coordination/An External Facility does not allow seamless Integration with Physician Electronic Medical Record
- ◆ Patient Wait times/Negative Effect on Patient Care
- ◆ Need action from policymakers to remove barriers of patient access to advanced imaging



Patient Access to Ambulatory Surgery Centers



Number of Ortho ASC per County in 2022

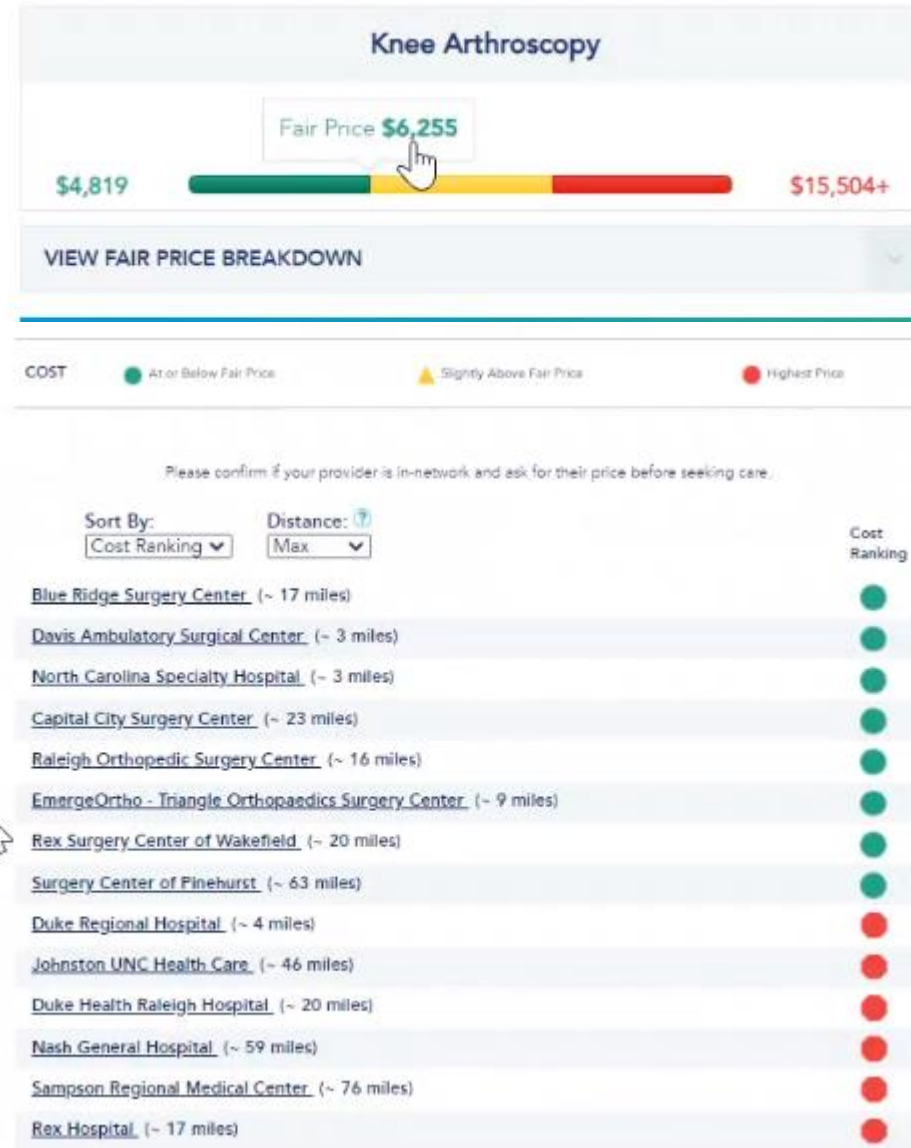


Patient Cost at Ambulatory Surgery Centers



Knee Arthroscopy – NC

Source: healthcare bluebook



Thank You and Questions

